



This job aid provides instructions for adding lease and receivable lease amendments. **Please read the document in its entirety. The number of system updates varies by type of amendment.**

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Overview

An amendment modifies the terms of an existing lease or receivable contract. In FPMT, an amendment is added via the [Lease Review](#) or [Receivable Review](#) wizard.

Amendment Process

Step	Action	Additional Information
1	Launch Lease Review or Receivable Review business process wizard	Use the search option to find your agency and select the Lease Review or Receivable Review business process wizard from the agency menu options.
2	Update existing data as needed	Edit lease/receivable contract and associated data as needed per the amendment type.
3	Add new amendment	Add new amendment table within wizard.
4	Review changes and exit business process wizard	Use the data review section to review your updates. ✓ Select save and close to exit the business process wizard. You must go all the way through the wizard to the data review section in order to save your changes to the database.
5	Attach copy of amendment	After completing the wizard, attach a copy of the amendment in the amendment table.

In addition to adding an amendment table in FPMT, the table below outlines the other system updates required for each type of amendment.

Required Updates by Amendment Type

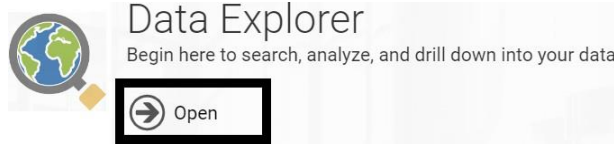
Amendment Type	Lease Tables	Data Field/Action
Lease Extension	Lease/Receivable Lease Contract Lease/Receivable Lease Payment	Lease End Date (update) Payment End Date (update)
Square Feet & Rent Change	Lease/Receivable Lease Contract Space(s) Lease/Receivable Lease Payment (existing) Lease/Receivable Lease Payment (new)	Lease Square Feet (update) Square Feet (update) Payment End Date (update) New Lease Payment (add)
Square Feet Change	Lease/Receivable Lease Contract Space(s)	Lease Square Feet (update) Square Feet (update)
Rent Rate Change	Lease/Receivable Lease Payment (existing) Lease/Receivable Lease Payment (new)	Payment End Date (update) New Lease Payment (add)
Amend Legal Description	None	None
Revise Parking	Lease/Receivable Lease Contract	Parking Included in Lease (update) Parking Stall Count (update)
Ownership Change	Lease/Receivable Lease Contract	Lessor Name (update)
Other Change in Lease Term	Lease/Receivable Lease Contract Lease/Receivable Lease Payment	Lease End Date (update) Payment End Date (update)
Asset Impairment	Lease/Receivable Lease Contract Lease/Receivable Lease Payment	Lease End Date (update) Payment End Date (update)

Enter Lease Amendment

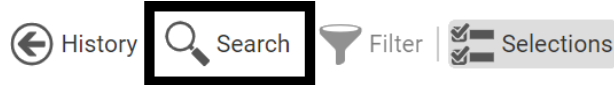
Launch Lease Review Wizard

The Lease Review wizard is accessed from the agency menu.

1. Select: Open.



2. Select: Search.



3. Select: Filter by.

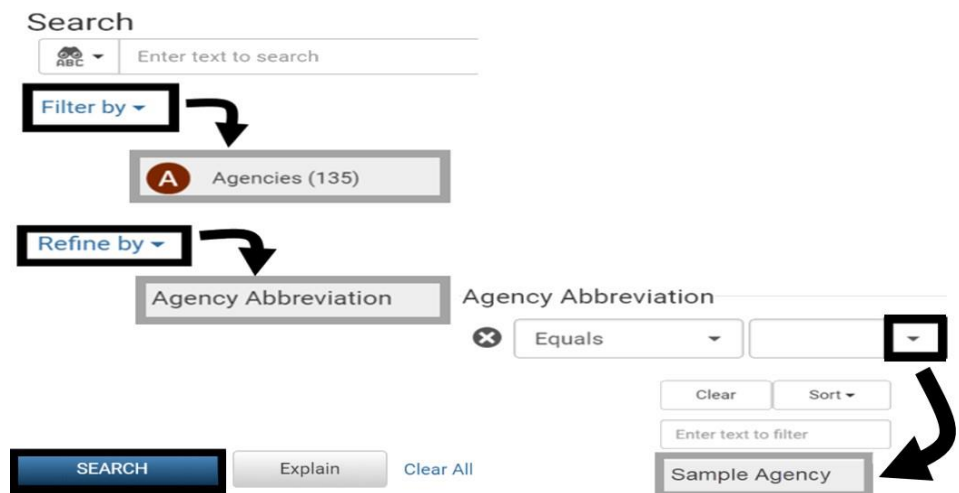
4. Select: Agencies.

5. Select: Refine by.

6. Select: Agency Abbreviation.

→ Select your agency from the list.

7. Select: Search.



8. Select: Menu.

9. Select: Lease review.



Update Lease Contract



FPMT will display a list of active lease contracts for the agency. Refer to the [required updates by type of amendment summary](#) for details on specific updates to make within the wizard.

1. Select: Details.

→ Use the search option to find a lease contract in the list.

Lease Contracts

Search Lease Numbers
Enter Search Text **← Search for lease contract**

Lease Name	Lease Number	Lease Start Date	Lease End Date	Details
Sample	123 Sample	08/31/2020	12/30/2020	
Sample	222 Sample	08/31/2020	12/30/2020	

2. Edit: Facility lease contract details.

→ Use the scroll bar to review/edit additional data.

3. Select: Next.


→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Contract Details


Name
Sample

Description

Lease Number
123 Sample

Lessor 
Sample

Lease Type
Financed Lease - Lease that is financed by outstanding debt and typically ownership of the asset is



Real Estate Authority 

Update Existing Lease Payments

FPMT will display a list of active lease payments for the lease contract. If the amendment type requires an update to an existing payment, select the Details icon.

1. Select: Details.

Lease Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

[Add New Lease Payment](#)

- 2. Review/Edit:** Lease payment details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Lease Payment Details

Name

Description

Payment Series Number

Payment Frequency

Payment Type

SAVE CHANGES

Cancel Changes

Add New Lease Payment(s)

If the amendment type involves a change in rent, you will also need to add a new payment series.

- 1. Select:** Add new lease payment.

Lease Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

Add New Lease Payment

← Previous

Next →

Cancel Changes

- 2. Input:** Name.
→ Use payment type - payment series number (payment type dash payment series number).
→ Description is optional.

Name

Description

- 3. Input:** Payment series number.
→ Use sequential numbers for payment series (1, 2, 3, etc.).
- 4. Select:** Payment frequency.
- 5. Select:** Payment type.
- 6. Input:** Payment amount.

Payment Series Number

Payment Frequency

Payment Type

Payment Amount

- 7. Input:** Index rate.
→ Use the index or rate in effect at lease commencement.

Index Rate

- 8. **Input:** Payment start date.
- 9. **Input:** Payment end date.

Payment Start Date

Payment End Date

→ Comments are optional.

Comment

10. **Select:** Save changes.

→ FPMT will display an error message if there are data validation issues that you need to correct.

SAVE CHANGES

Cancel Changes



Update Space Table

FPMT will display a list of active spaces for the lease contract. If the amendment involves updating the square footage, follow the steps below.

1. **Select:** Details.

→ FPMT will display space details.

Lease Spaces

Space Name	Space ID	Details	Delete
Test Space	001		

2. **Edit:** Space details.

→ Use the scroll bar to review/edit additional data.

→ The total amount of Space square feet cannot exceed the lease contract square feet.

3. **Select:** Save changes.

Edit Space Details

Name

OFM - 001

Description

Unique Facility ID

A04976

Space ID

001

Receivable Lease Number

Tenant

Office of Financial Management - 105

Other Tenant

Square Feet

500

SAVE CHANGES

Cancel Changes

Add Lease Amendment

All lease amendment types require an amendment table.

- 1. Select:** Add new lease amendment.

Lease Amendments

Amendment Name	Amendment Number	Details	Delete
Sample	123 Sample		

[Add New Lease Amendment](#)

[← Previous](#)
[Next →](#)
[SAVE CHANGES](#)
[Cancel Changes](#)

- 2. Input:** Name.
→ Use the amendment type and amendment number for the name. (e.g., Lease Extension – 1)
→ Description is optional.

Name

Description

- 3. Input:** Amendment number.
→ Use sequential numbers for amendments in the order they were executed (1, 2, 3, etc.).
- 4. Select:** Amendment type.

Amendment Number

Amendment Type

- 5. Input:** Amendment description.
→ Provide brief description of what has changed in the lease.

Amendment Description

- 6. Input:** Amendment effective date.
- 7. Input:** Amendment execution date.
→ Comments are optional.

Amendment Effective Date

Amendment Execution Date

Comment

- 8. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.

[SAVE CHANGES](#)

[Cancel Changes](#)

Data Review and Exit Business Process Wizard

FPMT will display all lease contracts and associated tables.

- ✓ You can expand each area to display specific lease contracts. This provides a quick way to review the information before you save your changes and exit the business process wizard.

1. Select: Open.

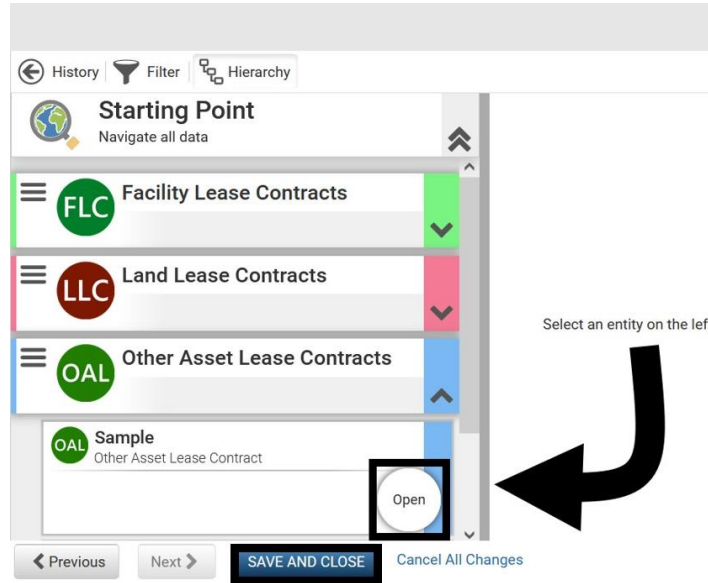
→ Review your changes. Select “Previous” to return to an earlier screen and make corrections.

2. Select: Save and Close.

→ FPMT will display an error message if there are data validation issues that you need to correct.

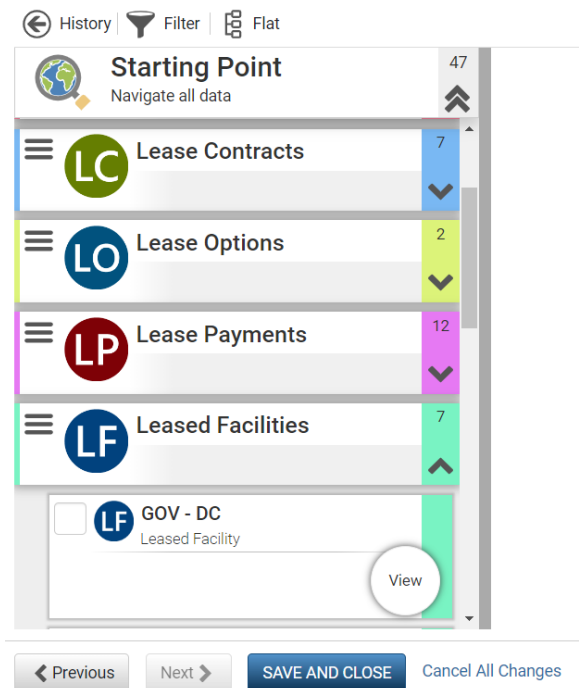
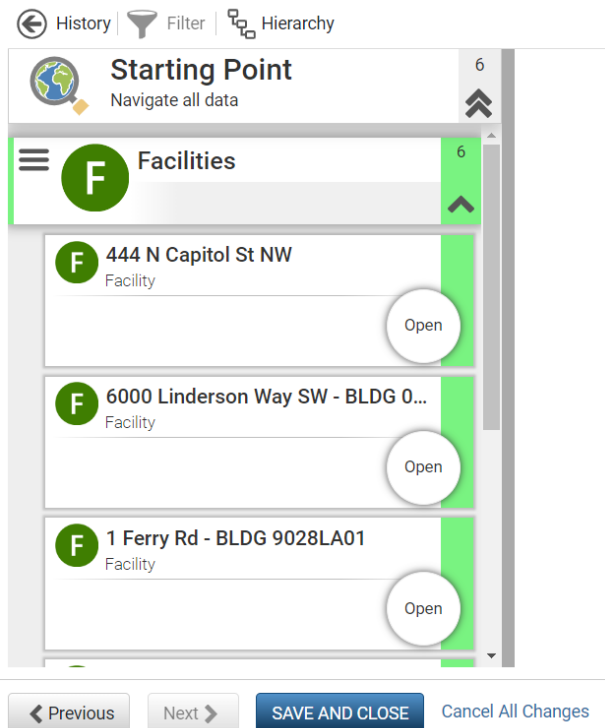
→ FPMT will save all changes and close the business process wizard.

- ✓ Cancel all changes = cancel all changes and close the business process wizard.



FPMT uses standard navigation tools to drill-up/drill-down to review information.

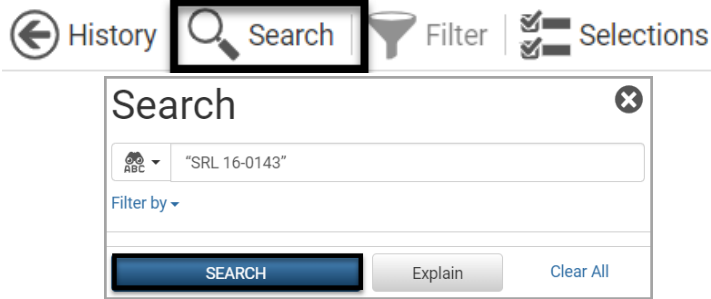
- ✓ Use the navigation options to go back (history) or narrow results (filter) or expand/flatten the hierarchy (flat/hierarchy) to review information.



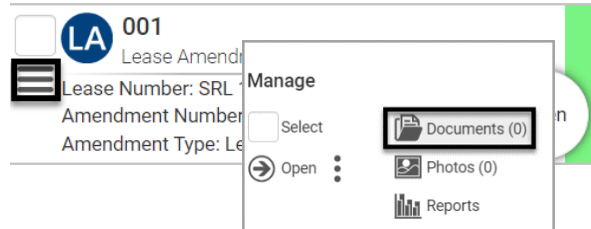
Attach Copy of Lease Amendment

Navigate to the new lease amendment tile to attach a copy of the document.

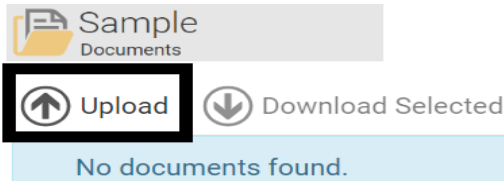
1. **Select:** Search.
2. **Input:** Lease number in quotation marks
→ e.g., "SRL 16-0143"
3. **Select:** Search.



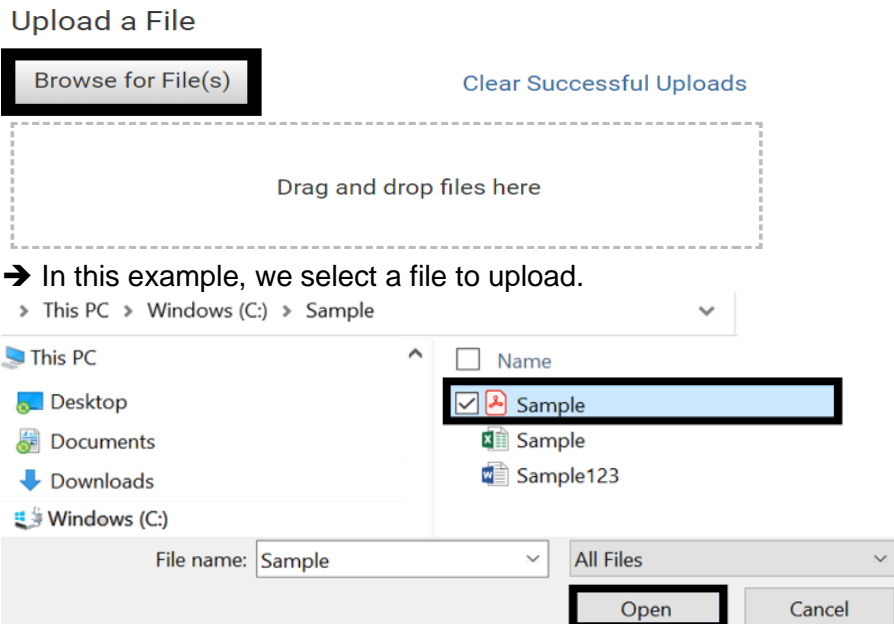
4. **Select:** Menu.
5. **Select:** Documents.



6. **Select:** Upload.



7. **Select:** Browse for files.
→ You can also drag and drop files.



8. **Select:** Close.

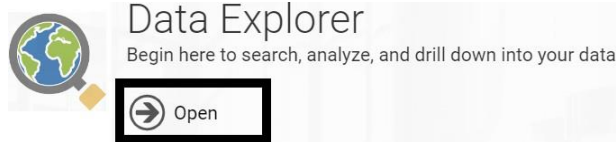


Enter Receivable Lease Amendment

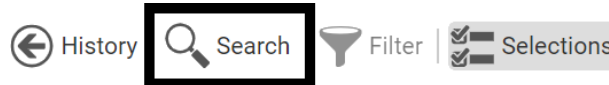
Launch Receivable Review Wizard

The Lease Review wizard is accessed from the agency menu.

1. Select: Open.



2. Select: Search.



3. Select: Filter by.

4. Select: Agencies.

5. Select: Refine by.

6. Select: Agency Abbreviation.

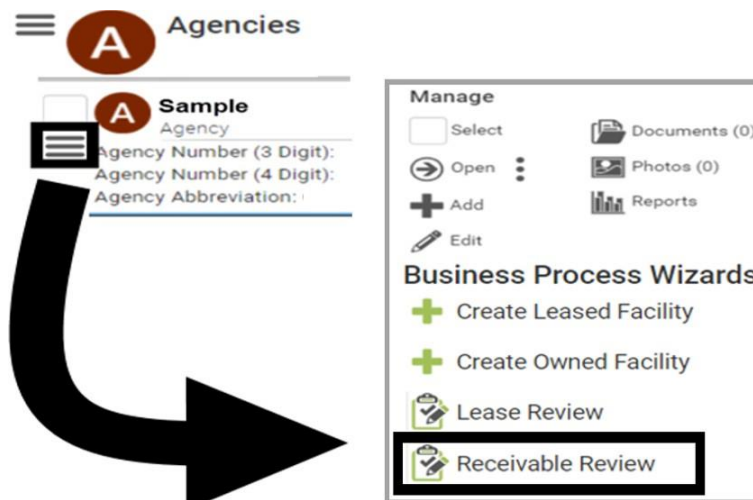
→ Select your agency from the list.

7. Select: Search.



8. Select: Menu.

9. Select: Receivable review.



Update Receivable Contract


FPMT will display a list of active receivable contracts for the agency. Refer to the [required updates by type of amendment summary](#) for details on specific updates to make within the wizard.


1. Select: Details.

→ Use the search option to find a receivable contract in the list.

Receivable Contracts

Search Receivable Contract Numbers

Enter Search Text  **Search for receivable contract**

Receivable Name	Receivable Contract Number	Receivable Contract Start Date	Receivable Contract End Date	Details
Sample	123 Sample	08/31/2020	12/30/2020	

2. Review/Edit: Receivable contract details.

→ Use the scroll bar to review/edit additional data.


3. Select: Next.

→ FPMT will display an error message if there are data validation issues that you need to correct.


Edit Receivable Contract Details

Name
Sample

Description

Receivable Contract Number 
123 Sample

Receivable Contract Type
Financed Lease - Lease that is financed by outstanding debt and typically ownership of the asset is



Real Estate Authority 

Update Existing Receivable Payments

FPMT will display a list of active receivable payments for the receivable contract. If the amendment type requires an update to an existing payment, select the Details icon.

1. Select: Details.

Receivable Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

[Add New Receivable Payment](#)

- 2. Review/Edit:** Receivable payment details.
→ Use the scroll bar to review/edit additional data.
- 3. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Receivable Payment Details

Name

Description

Payment Series Number



Payment Frequency

Payment Type

SAVE CHANGES Cancel Changes

- 4. Select:** Next.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Receivable Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

[Add New Receivable Payment](#)



[← Previous](#) **Next >** Cancel Changes

Add New Receivable Payment(s)

If the amendment type involves a change in rent, you will also need to add a new payment series.

- 1. Select:** Add new receivable payment.

Receivable Payments

Payment Name	Payment Series Number	Details	Delete
Sample	123 Sample		

Add New Receivable Payment

[← Previous](#) [Next >](#) Cancel Changes

- 2. Input:** Name.
→ Use payment type - payment series number (payment type dash payment series number).
→ Description is optional.

Name

Description

- 3. Input:** Payment series number.
→ Use sequential numbers for payment series (1, 2, 3, etc.).
- 4. Select:** Payment frequency.
- 5. Select:** Payment type.
- 6. Input:** Payment amount.

Payment Series Number

Payment Frequency

Payment Type

Payment Amount

- 7. Input:** Index rate.
→ Use the index or rate in effect at lease commencement.

Index Rate 

- 8. Input:** Payment start date.
- 9. Input:** Payment end date.
→ Comments are optional.

Payment Start Date

Payment End Date

Comment


- 10. Select:** Save changes.
→ FPMT will display an error message if there are data validation issues that you need to correct.

Update Space Table

FPMT will display a list of active spaces for the receivable contract. If the amendment involves updating the square footage, follow the steps below.

- 1. Select:** Details.
→ FPMT will display space details.

Receivable Spaces

Space Name	Space ID	Details	Delete
GOV - 0001	0001		

- 2. Edit:** Space details.
 - Use the scroll bar to review/edit additional data.
 - The total amount of Space square feet cannot exceed the receivable contract square feet.
 - The sum of all Space square feet cannot exceed the master lease contract or owned facility square feet.
- 3. Select:** Save changes.

Edit Space Details

Name

Description

Unique Facility ID

Space ID [?](#)

Tenant [?](#)

Other Tenant [?](#)

Square Feet [?](#)

Square Feet Measurement Type

SAVE CHANGES Cancel Changes

Add Receivable Amendment

All amendment types require an amendment table.

- 1. Select:** Add new receivable amendment.

Receivable Amendments

Amendment Name	Amendment Number	Details	Delete
Sample	123 Sample		

Add New Receivable Amendment

[← Previous](#) [Next →](#) **SAVE CHANGES** Cancel Changes

- 2. Input:** Name.
 - Use the amendment type and amendment number for the name. (e.g., Lease Extension – 1)
 - Description is optional.

Name

Description

- 3. Input:** Amendment number.
 - Use sequential numbers for amendments in the order they were executed (1, 2, 3, etc.).
- 4. Select:** Amendment type.

Amendment Number

Amendment Type

- 5. Input:** Amendment description.
 - Provide brief description of what has changed in the lease.

Amendment Description

- 6. Input:** Amendment effective date.
- 7. Input:** Amendment execution date.
- Comments are optional.

Amendment Effective Date

Amendment Execution Date

Comment

- 8. Select:** Save changes.
- FPMT will display an error message if there are data validation issues that you need to correct.

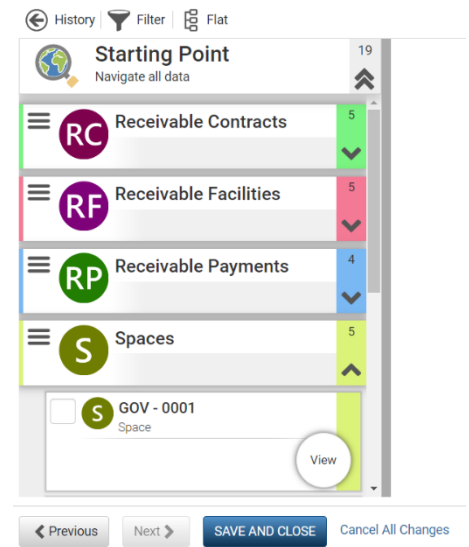
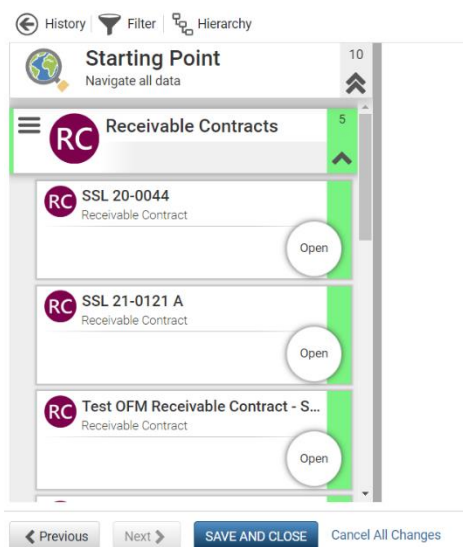
SAVE CHANGES Cancel Changes

Data Review and Exit Business Process Wizard

FPMT will display all receivable contracts.

- ✓ You can expand each area to display specific receivable contracts. This provides a quick way to review the information before you save your changes and exit the business process wizard.
- ✓ FPMT allows you to drill-up/drill-down to review information. Click the Hierarchy button to change to the Flat view.

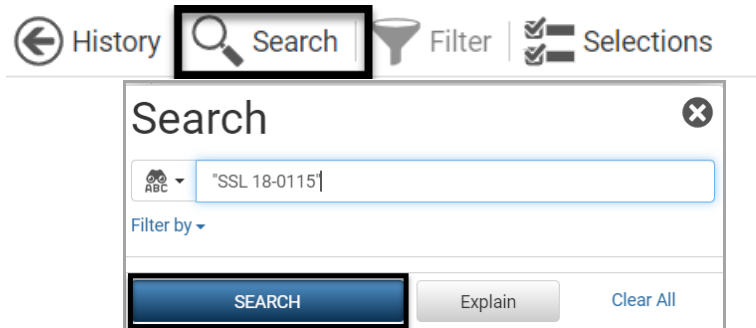
- 1. Select:** Open.
- Review your changes. Select "Previous" to return to an earlier screen to make corrections.
- 2. Select:** Save and Close.
- FPMT will display an error message if there are data validation issues that you need to correct.
- FPMT will save all changes and close the business process wizard.
- ✓ Cancel all changes = cancel all changes and close the business process wizard.



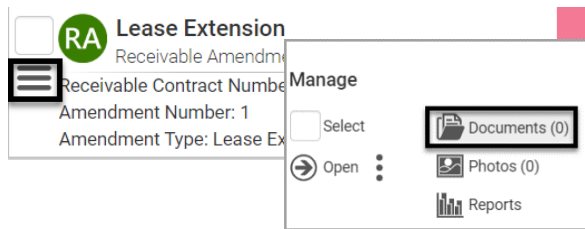
Attach Copy of Receivable Amendment

Navigate to the new receivable amendment to attach a copy of the document.

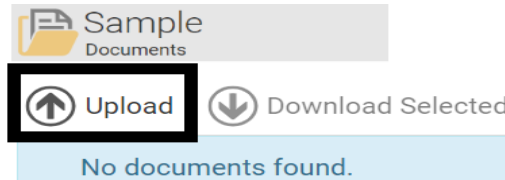
1. **Select:** Search.
2. **Input:** Receivable lease number in quotation marks
→ e.g., "SSL 18-0115"
3. **Select:** Search.



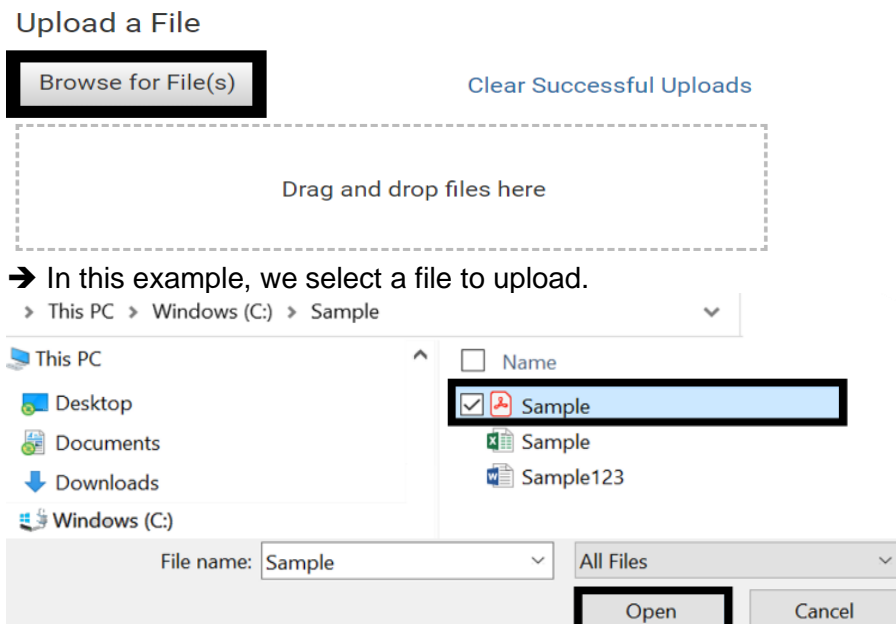
4. **Select:** Menu.
5. **Select:** Documents.



6. **Select:** Upload.



7. **Select:** Browse for files.
→ You can also drag and drop files.



8. **Select:** Close.

